
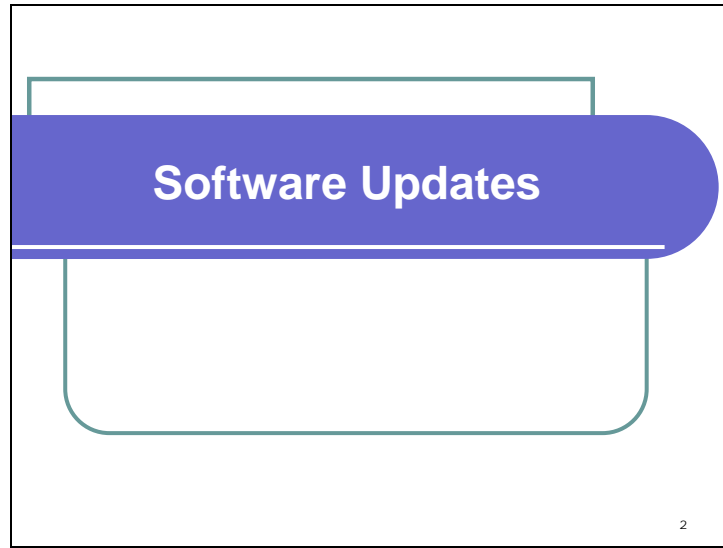


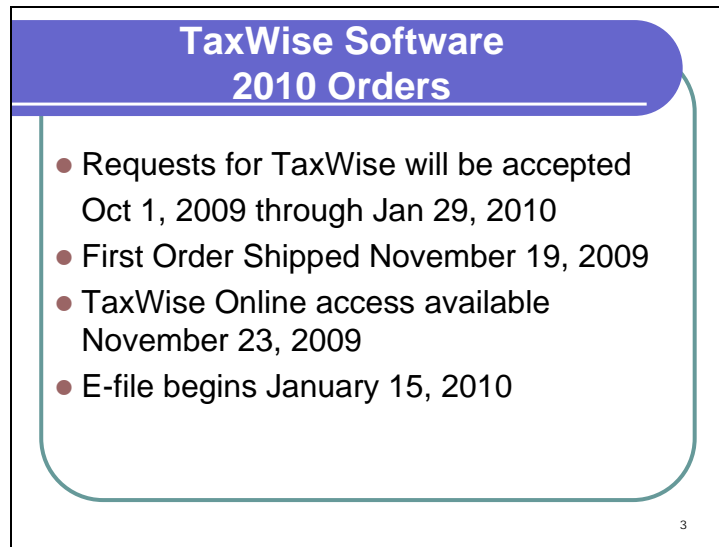
**VITA Grant Program
Orientation
December 2, 2009**



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Slide 2



A presentation slide with a blue header bar containing the text "TaxWise Software 2010 Orders". Below the header, a light blue rounded rectangle contains a bulleted list of four items. The slide is framed by a thin black border. A small number "3" is located in the bottom right corner of the slide frame.

**TaxWise Software
2010 Orders**

- Requests for TaxWise will be accepted
Oct 1, 2009 through Jan 29, 2010
- First Order Shipped November 19, 2009
- TaxWise Online access available
November 23, 2009
- E-file begins January 15, 2010

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Critical – sites requesting an exception to SPEC's 35 or more policy requirement must receive approval before the software order can be placed.

To ensure we are accountable for our resources orders should not be placed for sites until we are confident they will open and use the software.

Please make sure your local offices are working with our local offices to ensure their orders are placed timely and shipped to the right locations.

TaxWise Software Training

All TaxWise Training will be delivered by recorded web sessions – located on the Practice Lab through Link & Learn Taxes

- **TaxWise Desktop Admin/trouble-shooting**
- **TaxWise Online Admin/trouble-shooting**
- **TaxWise Desktop/PBT for Preparers**
- **TaxWise Online/PBT for Preparers**
- **Reports & Tax Law Changes**
- **Security Procedures & Web Resources**
- **TaxWise Desktop & Online Updates**

TaxWise (desktop) Software Changes for Tax Year 2009

- TaxWise is no longer required to support Windows 2000 Operating System
- New enforcement for Desktop passwords
- Improved Client/Return List Functionality
- New “warning message” to prevent closing of TaxWise before data is saved

TaxWise (desktop) Software Changes for Tax Year 2009

- Sorting Return Explorer
- Automatic processing of Acknowledgements
- New Communications Menu/Options
- Addition of a new User Group
- Watermarks added to Print Packets
- Improved Release Notes

TaxWise (desktop) Software Changes for Tax Year 2009

- Sch M set as a default
- Sch L automatically loads with the following
 - Enter real estate taxes on Sch A
 - Link to the New Motor Vehicle Tax Worksheet from Sch A line 7
 - Link to Form 4684 from Sch A line 20
- Pre-set routing number for new savings bonds option

IRS E-file Updates

- New Electronic Filing PIN process
- Tax year 2009 returns filed with Form 5405 must be submitted by paper
- Modernized e-file

New Software Contract

- Filing Season 2010 is the final year of the existing contract with CCH SFS for the purchase of TaxWise.
- Plan to announce the new contract during December 2009.
- New contract begins with filing season 2011 (tax year 2010).